



New and emerging acquisitions workflows Purchase Requests

Yoel Kortick | Senior Librarian

Agenda

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Introduction

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Purchase request from Primo

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Staff creation of purchase requests

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Staff management of purchase requests

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Future Developments

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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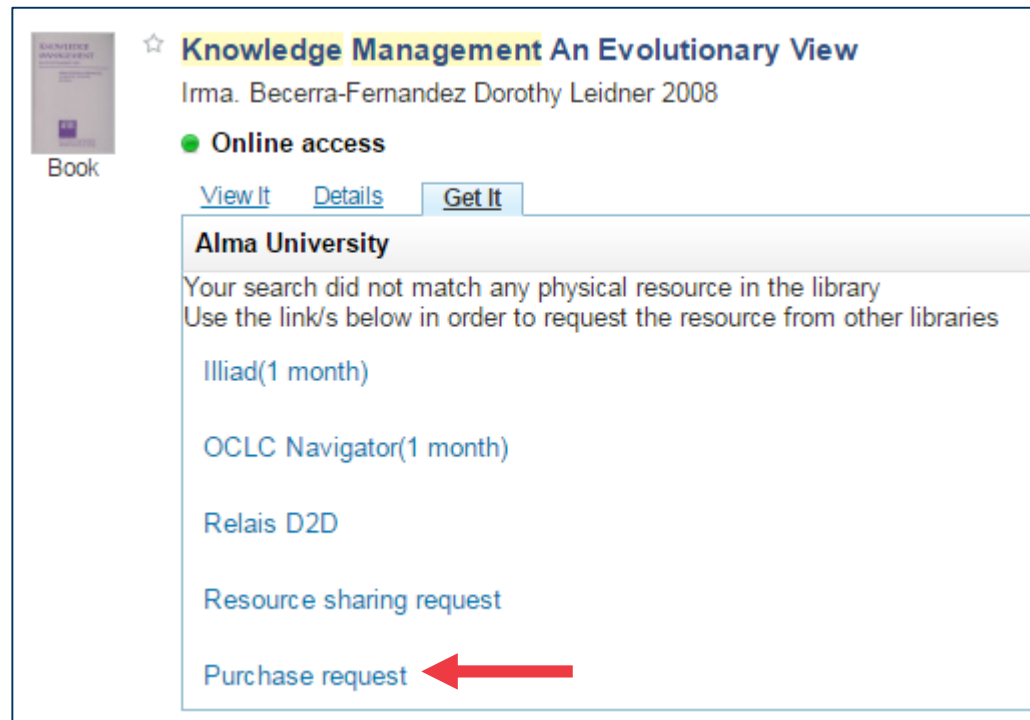
Future Developments

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

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.



☆ **Knowledge Management An Evolutionary View**
Irma. Becerra-Fernandez Dorothy Leidner 2008

● Online access

[View It](#) [Details](#) [Get It](#)

Alma University

Your search did not match any physical resource in the library
Use the link/s below in order to request the resource from other libraries

- [Illiad\(1 month\)](#)
- [OCLC Navigator\(1 month\)](#)
- [Relais D2D](#)
- [Resource sharing request](#)
- [Purchase request](#) ←

Purchase request from Primo discovery search results

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

Knowledge Management An Evolutionary View
Irma. Becerra-Fernandez Dorothy Leidner 2008

● Online access

[View It](#) [Details](#) [Get It](#)

Alma University

Resource Information:

Citation type: ☒ Book ☐ Journal

Title:*

Author:

Edition:

ISBN:

LCCN:

OCLC Number:

Publisher:

Publication date:

Place of publication:

Volume:

Purchase request from Primo discovery search results

- Request is placed

Knowledge Management An Evolutionary View
Irma. Becerra-Fernandez Dorothy Leidner 2008

● **Online access**

[View It](#) [Details](#) [Get It](#)

Alma University

Request placed

[Refresh Services List](#)

Purchase request from Primo discovery search results

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

e-Shelf

Queries

My Account

My Databases

Open University

Alma University

Loans (1)

Requests (1)

Fine & Fees

Blocks & Messages

Personal Settings

List of Requests

#	Type	Title	Author	Status
01	Acquisition	Knowledge Management An Evolutionary View	Becerra-Fernandez, Irma.	In Review

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

Assigned to Me **Unassigned** Assigned to Others

0 rows selected

☐ Select All

1 ☐ [Knowledge Management An Evolutionary View](#)
Citation type: Book
Request status: In Review
Requester: Alicia Chen
Created on: 08/11/2016
Updated on: 08/11/2016

[Edit](#) | [Approve and Order](#) | [Reject](#) | [Send query to requester](#) | [Assign to](#)

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'.


Alicia Chen ★ e-Shelf My Account Sign out

Find Databases | Library Search | Collection Discovery | **Citation Linker** | A to Z | Help | Language: English▼

Citation Linker

Journal **Book** Article

Book Title: Knowledge managemen

Date (YYYY-MM-DD): 

Volume:

Part:

ISBN:

Author Last Name: Safransky

Author First Name: James


Author Initials:

Publisher: J and S Press

Go Clear

Purchase request from Primo discovery Citation Linker

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



The screenshot displays the ExLibris interface for a citation linker. At the top is the ExLibris logo. Below it, the title "Knowledge management in South Korea" and the author "James Safransky" are shown. A yellow dot icon precedes the text "Check availability". There are two tabs: "Get It" (active) and "Details". Below the tabs is a button that says "Open source in a new window". A message states: "Your search did not match any physical resource in the library. Use the link/s below in order to request the resource from other libraries". A list of links follows: "Illiad(1 month)", "OCLC Navigator(1 month)", "Relais D2D", "Resource sharing request", and "Purchase request". The "Purchase request" link is highlighted with a red rectangular box. At the bottom, it says "Having problems? Please contact the staff".

ExLibris

Knowledge management in South Korea
James Safransky

● Check availability

[Get It](#) [Details](#)

[Open source in a new window](#)

Your search did not match any physical resource in the library
Use the link/s below in order to request the resource from other libraries

[Illiad\(1 month\)](#)

[OCLC Navigator\(1 month\)](#)

[Relais D2D](#)

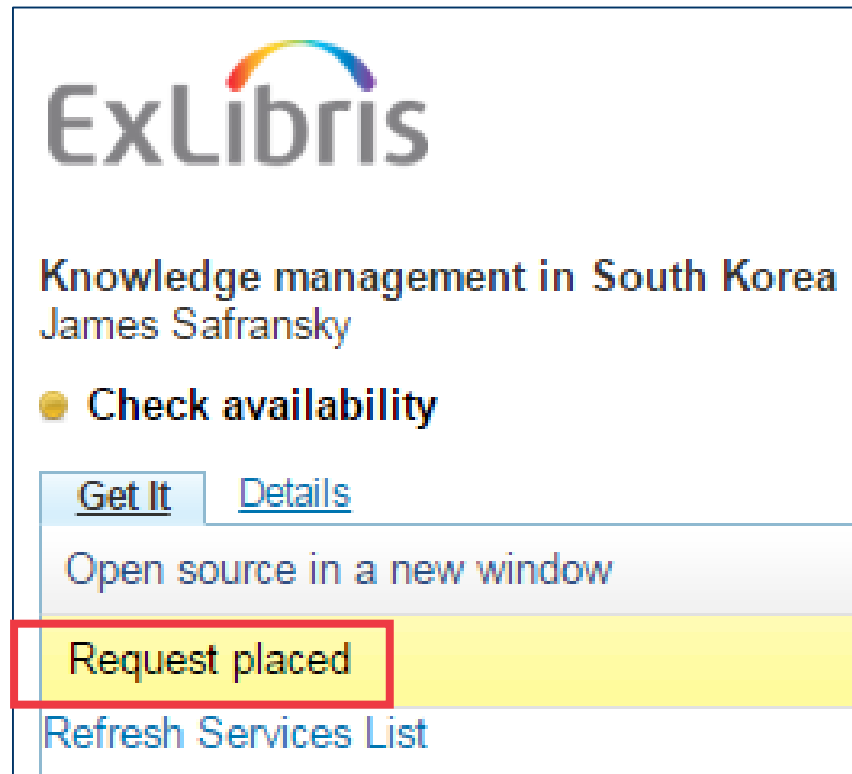
[Resource sharing request](#)

[Purchase request](#)

Having problems? Please contact the staff

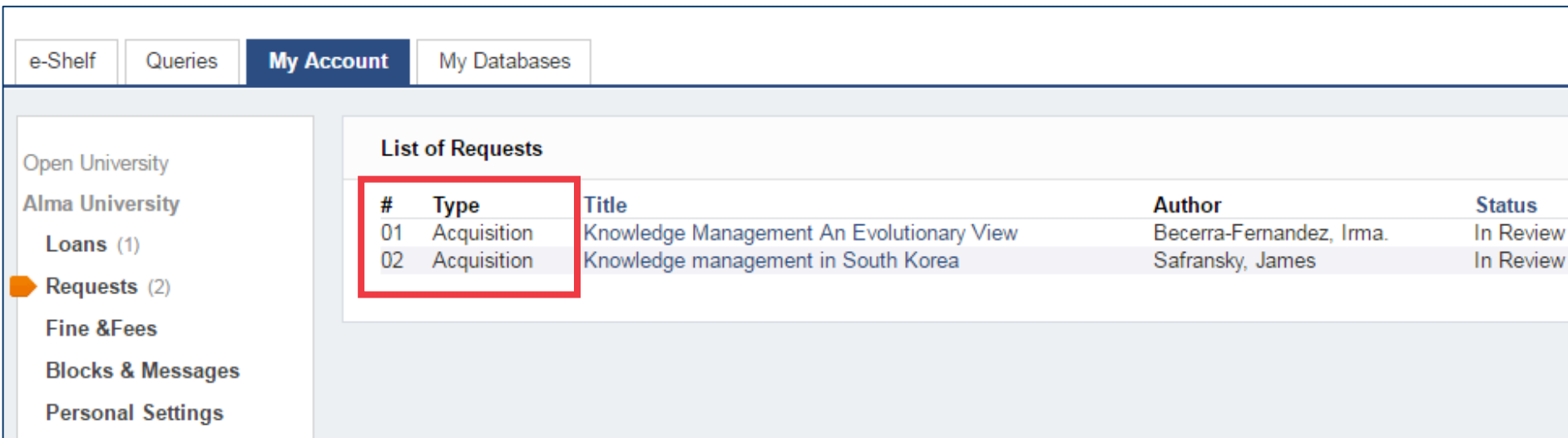
Purchase request from Primo discovery Citation Linker

- 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.



The screenshot shows the 'My Account' section of the Primo interface. At the top, there are tabs for 'e-Shelf', 'Queries', 'My Account' (which is selected), and 'My Databases'. On the left side, there is a navigation menu with links for 'Open University', 'Alma University', 'Loans (1)', 'Requests (2)' (which is highlighted with an orange arrow), 'Fine & Fees', 'Blocks & Messages', and 'Personal Settings'. The main content area is titled 'List of Requests' and contains a table with the following data:

#	Type	Title	Author	Status
01	Acquisition	Knowledge Management An Evolutionary View	Becerra-Fernandez, Irma.	In Review
02	Acquisition	Knowledge management in South Korea	Safransky, James	In Review

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

The screenshot displays the 'Manage Purchase Requests' interface. At the top, there are three tabs: 'Assigned to Me', 'Unassigned', and 'Assigned to Others'. The 'Unassigned' tab is selected and highlighted with a red box. Below the tabs, it shows '0 rows selected'. A search filter is applied: 'Search limited to: Requester: Alicia Chen'. Below the search bar is a 'Select All' checkbox. The list of requests contains two items, both with a checkbox on the left. Item 1 is 'Knowledge Management An Evolutionary View' and item 2 is 'Knowledge management in South Korea'. Both items are of type 'Book', status 'In Review', requested by 'Alicia Chen', and created/updated on '08/11/2016'. Each item has a set of action links: 'Edit', 'Approve and Order', 'Reject', 'Send query to requester', and 'Assign to'. The entire list of items is enclosed in a red rectangular box.

Assigned to Me	Unassigned	Assigned to Others
0 rows selected		
Search limited to: Requester: Alicia Chen		
<input type="checkbox"/> Select All		
1 <input type="checkbox"/> Knowledge Management An Evolutionary View Citation type: Book Request status: In Review Requester: Alicia Chen Created on: 08/11/2016 Updated on: 08/11/2016 Edit Approve and Order Reject Send query to requester Assign to		
2 <input type="checkbox"/> Knowledge management in South Korea Citation type: Book Request status: In Review Requester: Alicia Chen Created on: 08/11/2016 Updated on: 08/11/2016 Edit Approve and Order Reject Send query to requester Assign to		

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

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Staff creation of purchase requests

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Staff management of purchase requests

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Future Developments

Staff creation of purchase requests

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

Purchase Requests

Create Purchase Request

Manage Purchase Requests

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

Staff creation of purchase requests

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

Resource Information

Citation type ☒Book ☐Journal

Title * Knowledge management and the modern libra

Author Safransky; James

Edition

ISBN

LCCN

OCLC number

Publisher J and S Press

Publication year 2016

Place of publication

Note

Volume

Request Attributes

Requested format ☒Physical ☐Electronic

Requester * Alicia Chen - Graduate Student - Alici:🔍📄📁

Request status In Review

Owning Library Main Library

Estimated cost 23.00 USD

Fund Library and Information Science (01/01:🔍📄📁)

Vendor/Account JS_MAIN/J and S Ltd. (Formerly "John:🔍📄📁)

Order-related information

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Future Developments

Staff management of purchase requests

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

Purchase Requests

Create Purchase Request

Manage Purchase Requests

Staff management of purchase requests

- The requests can be faceted in a variety of ways

Status

[Approved \(35\)](#)
[In Review \(16\)](#)
[Rejected \(11\)](#)

Citation type

[Book \(59\)](#)
[Journal \(3\)](#)

Request format

[Electronic \(1\)](#)
[Physical \(61\)](#)

Vendor

[National Booksellers \(2\)](#)
[Gale \(2\)](#)
[J and S Ltd. \(Formerly "Johnson and Smith Ltd."\) \(1\)](#)
[Gale-A \(1\)](#)
[Amazon \(1\)](#)

Owning library

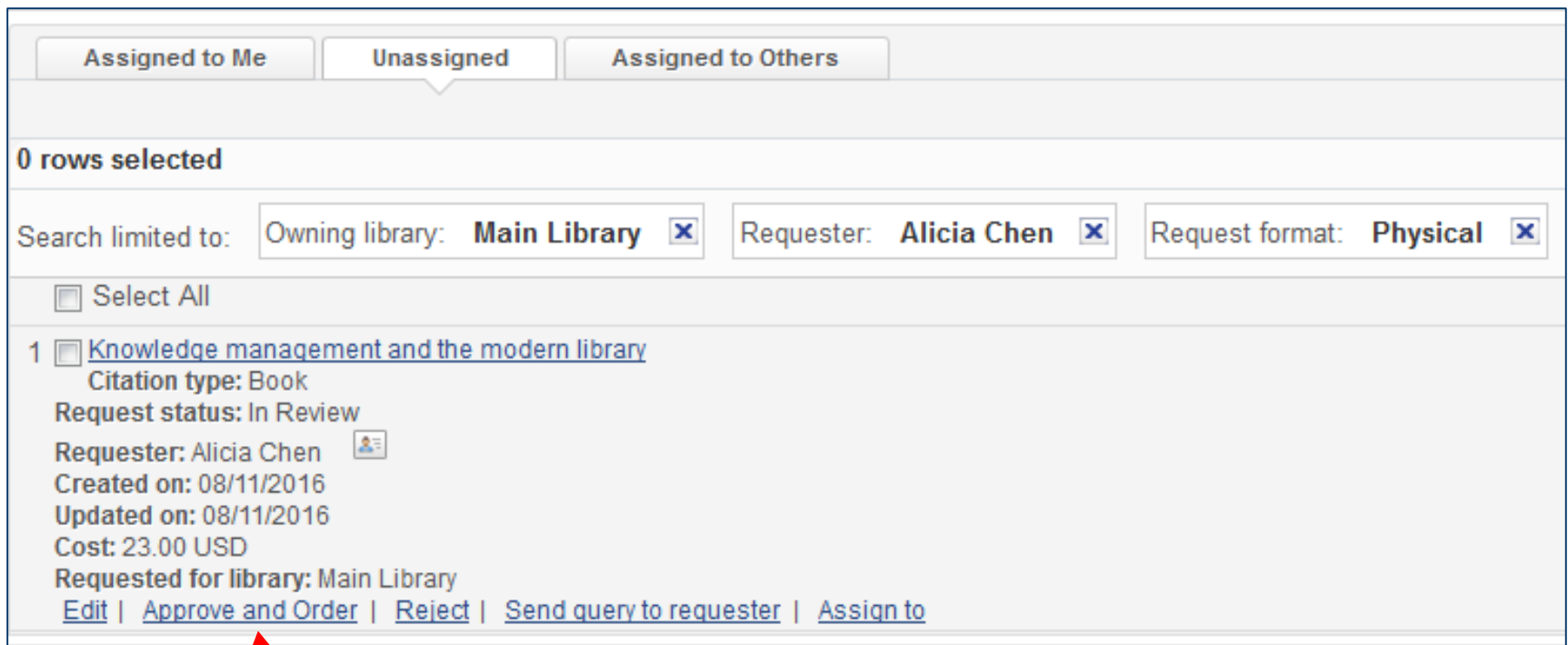
[Main Library \(38\)](#)
[Engineering Library \(1\)](#)
[Art Library \(1\)](#)

Requester

[Alice Jones \(2\)](#)

Staff management of purchase requests

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



The screenshot shows a web interface for managing purchase requests. At the top, there are three tabs: 'Assigned to Me', 'Unassigned' (which is active), and 'Assigned to Others'. Below the tabs, it says '0 rows selected'. There are three search filters: 'Owning library: Main Library', 'Requester: Alicia Chen', and 'Request format: Physical'. Below these filters is a 'Select All' checkbox. A list of requests is shown, with the first one selected (checkbox checked). The request details are: 'Knowledge management and the modern library', 'Citation type: Book', 'Request status: In Review', 'Requester: Alicia Chen', 'Created on: 08/11/2016', 'Updated on: 08/11/2016', 'Cost: 23.00 USD', and 'Requested for library: Main Library'. At the bottom of the request details, there are several action links: 'Edit', 'Approve and Order', 'Reject', 'Send query to requester', and 'Assign to'.

Assigned to Me Unassigned Assigned to Others

0 rows selected

Search limited to: Owning library: **Main Library** Requester: **Alicia Chen** Request format: **Physical**

☐ Select All

1 ☒ [Knowledge management and the modern library](#)
Citation type: Book
Request status: In Review
Requester: Alicia Chen
Created on: 08/11/2016
Updated on: 08/11/2016
Cost: 23.00 USD
Requested for library: Main Library
[Edit](#) | [Approve and Order](#) | [Reject](#) | [Send query to requester](#) | [Assign to](#)

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



Library	Location	Barcode	Receiving date	Item policy
1 Main Library	General	AU41032	-	-

Receiving note

Vendor information

Material Supplier * JS/JS_MAIN   [J and S Ltd. \(Formerly "Johnson and Smith Ltd."\) \(JS\)/J and S Ltd. Main Account \(JS-MAIN\)](#)

Claiming grace period (days) 2

Or expected receipt date  

Expected receipt after ordering (days) 10

Pricing


List Price * 23.00 USD


Quantity for pricing * 1

Net price 23.00 USD

Discount (%) 0.0

Funding

 Quick Add

Fund  Percent 0.0 Amount 0.00 USD

#	Fund Name	Percent	Amount
1 1	Library and Information Science (01/01/2016 - 12/31/2016) (4,566.04 USD)	100.0%	23.00 USD
2 Total		100.0%	23.00 USD

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.

Summary

Description

Alerts

Invoice Lines

Associated PO Lines

Communications

Interested Users

History

Notes

Attachments

Add Interested Users

Search for a user

Notify ☐ user upon receiving/activation

Hold ☐ item

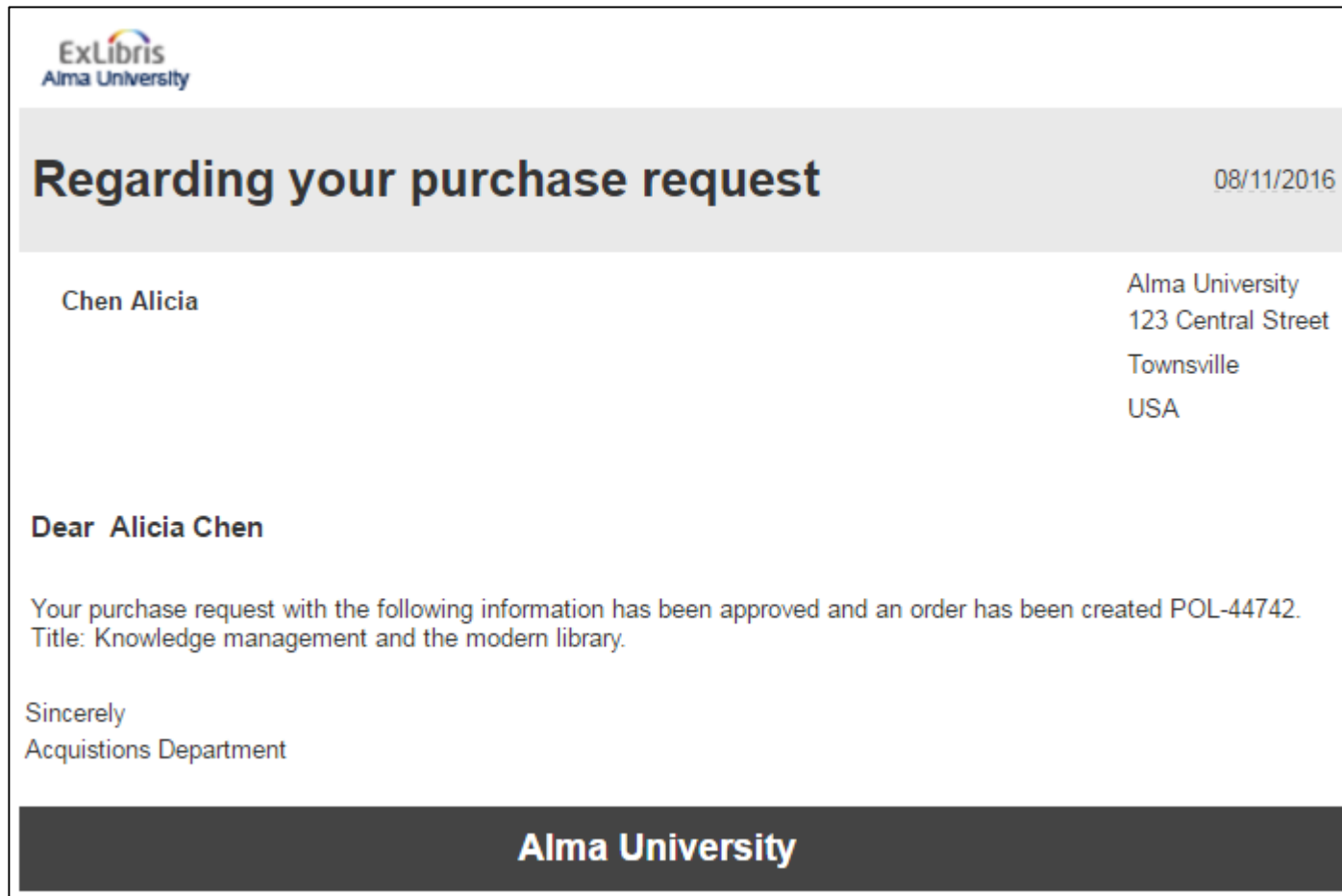
Add User

Columns

	Name	Email	Notify user upon receiving/acti	Hold item
1	Yoel Kortick	thelibrary613@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	Alicia Chen	thelibrary613@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>

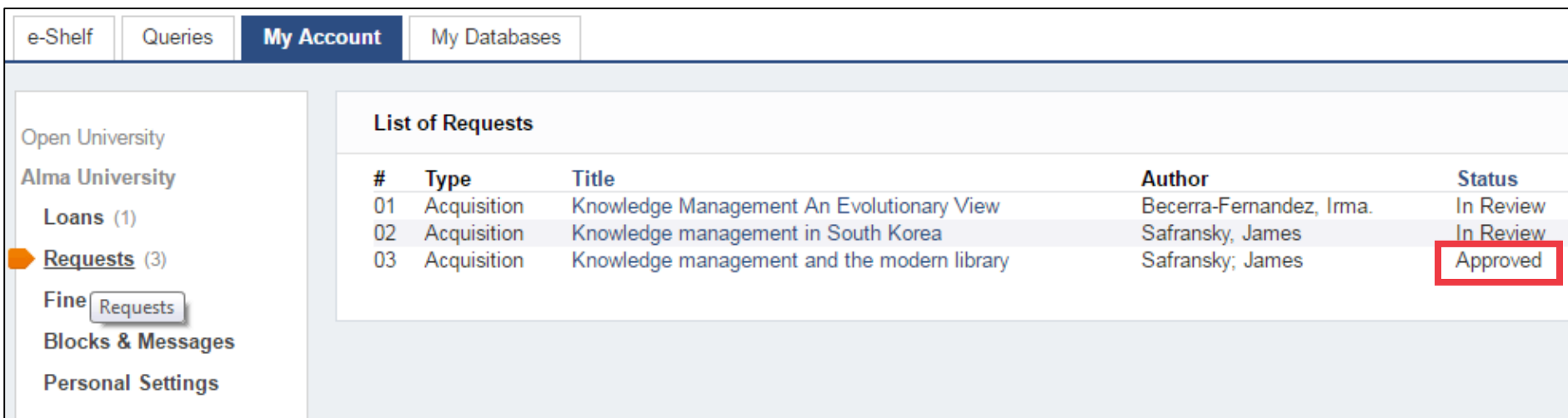
Staff management of purchase requests

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



Staff management of purchase requests

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



The screenshot displays the 'My Account' section of the Primo interface. At the top, there are tabs for 'e-Shelf', 'Queries', 'My Account' (which is selected), and 'My Databases'. On the left side, a navigation menu includes 'Open University', 'Alma University', 'Loans (1)', 'Requests (3)' (highlighted with an orange arrow), 'Fine Requests' (in a button), 'Blocks & Messages', and 'Personal Settings'. The main area is titled 'List of Requests' and contains a table with the following data:

#	Type	Title	Author	Status
01	Acquisition	Knowledge Management An Evolutionary View	Becerra-Fernandez, Irma.	In Review
02	Acquisition	Knowledge management in South Korea	Safransky, James	In Review
03	Acquisition	Knowledge management and the modern library	Safransky, James	Approved

The 'Approved' status for the third request is highlighted with a red rectangular box.

Staff management of purchase requests

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

The screenshot displays the 'Manage Purchase Requests' interface. On the left, there are three filter sections: 'Limit results to:' with a 'Status' filter (Approved (36), In Review (15), Rejected (11)), 'Citation type' (Book (59), Journal (3)), and 'Request format' (Electronic (1), Physical (61)). Below these are 'Vendor' (National Booksellers (2), Gale (2), J and S Ltd. (Formerly "Johnson and Smith Ltd.") (1), Gale-A (1), Amazon (1)) and 'Owning library' (Main Library (38), Engineering Library (1), Art Library (1)). The main area on the right has tabs for 'Assigned to Me', 'Unassigned', and 'Assigned to Others'. The 'Unassigned' tab is selected, showing a list of 3 requests. A red arrow points to the 'Unassigned' tab. The first request is 'Knowledge Management An Evolutionary View' (Book, In Review, Requester: Alicia Chen, Created on: 08/11/2016, Updated on: 08/11/2016). The second request is 'Knowledge management and the modern library' (Book, Approved, PO Line Reference: POL-44742, Requester: Alicia Chen, Created on: 08/11/2016, Updated on: 08/11/2016, Cost: 23.00 USD, Requested for library: Main Library). The third request is 'Knowledge management in South Korea' (Book, In Review, Requester: Alicia Chen, Created on: 08/11/2016, Updated on: 08/11/2016).

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

1 ☐ [Knowledge Management An Evolutionary View](#)

Citation type: Book

Request status: In Review

Requester: Alicia Chen 

Created on: 08/11/2016

Updated on: 08/11/2016

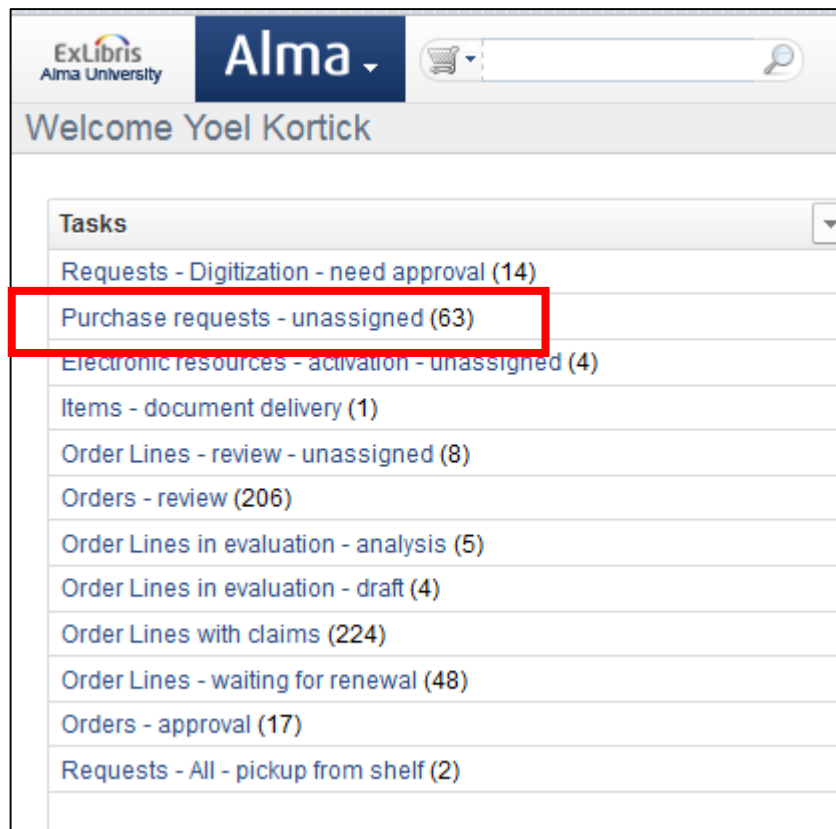
[Edit](#) | [Approve and Order](#) | [Reject](#) | [Send query to requester](#) | [Assign to](#)

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

Staff management of purchase requests

- Staff can also manage purchase requests from the task list



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Future Developments

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

Future developments – Customizing the form

Knowledge Management An Evolutionary View
Irma. Becerra-Fernandez Dorothy Leidner 2008

● Online access

[View It](#) [Details](#) [Get It](#)

Alma University

Resource Information:

Citation type: ☒ Book ☐ Journal

Title*:

Author:

Edition:

ISBN:

LCCN:

OCLC Number:

Publisher:

Publication date:

Place of publication:

Volume:

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.

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)

Future developments – create from Hold Request

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

☐ Select All

- 1 ☐ **Survey of consumer attitudes and behavior, September 1981 [computer file] / principal investigator, Economic Behavior Program, Survey Research Center, University of Michigan.**

Location: General Call Number: ICPSR 8772

Requests: 1

Description: ICPSR # I08772

Imprint: Ann Arbor, Mich. : Inter-university Consortium for Political and Social Research distributor [198-?]

[Print Slip](#) | [Edit](#) | [Cancel Request](#) | [Update Expiry](#) | [Mark as Missing](#) | [Convert to Resource Sharing](#)

[Create Purchase Request](#)

- 2 ☐ **Pride and prejudice ; / edited by Mark Dawson.**

Location: General Call Number: PZ3.D55BI64PR4556

Requests: 1 Author: Austen, Jane, 1775-1817

ISBN: 0140430636

Imprint: Harmondsworth, : Penguin 1969, 1971.

[Print Slip](#) | [Edit](#) | [Cancel Request](#) | [Update Expiry](#) | [Mark as Missing](#) | [Convert to Resource Sharing](#)

[Create Purchase Request](#)

Future developments – cancel from My Account

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

e-Shelf

Queries

My Account

My Databases

Open University

Alma University

Loans (1)

Requests (4)

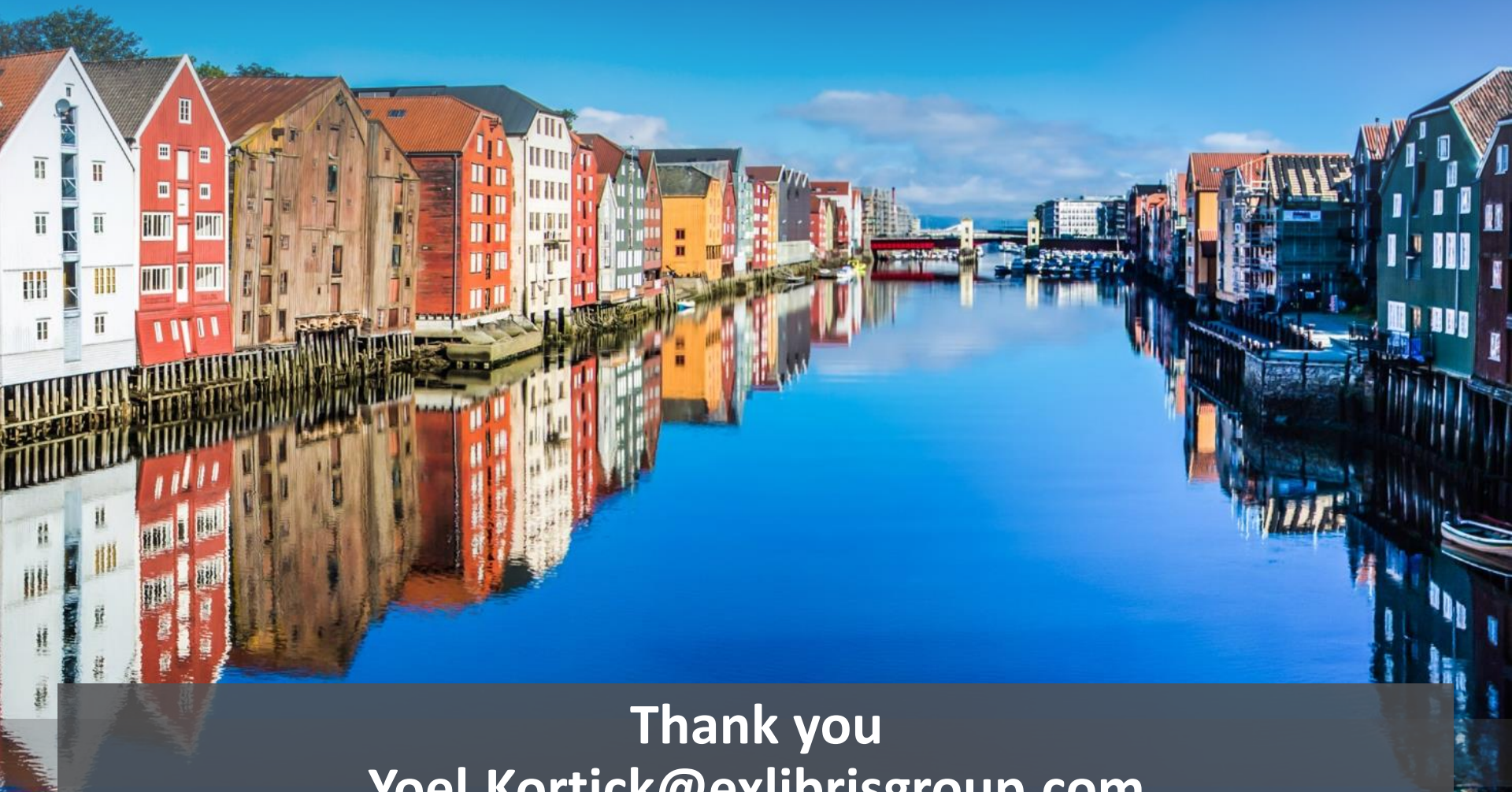
Fine & Fees

Blocks & Messages

Personal Settings

List of Requests

#	Type	Title	Author	Status	Pickup Location	Location	Actions
01	Hold	A history of twentieth-century American women's poetry /		Not Started. Place in queue is: 1	Main Library		Cancel
02	Acquisition	Knowledge Management An Evolutionary View	Becerra-Fernandez, Irma.	In Review			Cancel
03	Acquisition	Knowledge management in South Korea	Safransky, James	In Review			Cancel
04	Acquisition	Knowledge management and the modern library	Safransky, James	Approved			



Thank you
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