Purchase Requests recent developments

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Introduction

• This presentation will focus primarily on new features recently added to the Purchase request functionality.
• For a general overview of working with Purchase Requests see:

1. **New staff roles (May 2018) - assigning owning library**
2. New staff roles (May 2018) – handling purchase requests
3. Determination of purchase request type (March 2018)
4. Purchase request "Use existing record" (March 2018)
5. Purchase request "Use existing record" (March 2018) - option 1
6. Purchase request "Use existing record" (March 2018) - option 2
7. Purchase request task list changes (May 2018)
8. Purchase request Primo form customization (May 2018)
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Determination of purchase request type (March 2018)

• When creating a purchase request the type of request is determined as follows:
  • The citation type for a searched item comes from the ISBN or ISSN.
    • If there is an ISBN number, the citation type is Book.
    • If there is an ISSN number, the citation type is Journal.
  • If neither number is present, the citation type is the type that was chosen when the purchase request was created.
• As an example of how this is applied

1. A purchase request of type Journal is created with no ISSN
2. The MD Editor is used to edit the record which is linked to the purchase request and an ISBN is added
3. The purchase request is then edited and saved
4. After the purchase request is saved, the citation type of the purchase request becomes Book (because an ISBN is present).
Determination of purchase request type (March 2018)

• A purchase request of type Journal is created with no ISSN
Determination of purchase request type (March 2018)

• The type is Journal
Determination of purchase request type (March 2018)

- The bibliographic record is edited in the metadata editor and the 020 is added

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</tr>
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</tr>
<tr>
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</tr>
<tr>
<td>245</td>
<td>$$a Libraries and information centers of Spokane Washington</td>
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</tbody>
</table>
Determination of purchase request type (March 2018)

- The type is still Journal but now we will edit and save
Determination of purchase request type (March 2018)

• Now the citation type is book
Determination of purchase request type (March 2018)

- Here an end user creates a purchase request in Primo.
- He chooses type "Journal" but does not include an ISSN.
Determination of purchase request type (March 2018)

- The type is "Journal" because even though there is no ISSN the user chose type "Journal"
• Note as well that after a purchase request is created the bibliographic information can be edited only from the metadata editor. It cannot be edited in the purchase request form, as all bibliographic fields are greyed out.
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Purchase request "Use existing record" (March 2018)

• At the point of creating a purchase request in Alma the staff user has two options:
  1. Create New Record
  2. Use Existing Record
Purchase request "Use existing record" (March 2018)

• If the staff user chooses "Use existing record" then:
• A "quick pick" list is available for the Title field while the other item fields are restricted.
• After searching for and choosing an existing record the staff user can either

1. Create the purchase request from this record.
2. Use this record as a "template" by switching to radio button "Create new record". In this case the bibliographic fields will become editable.
• Option 1 is useful if the staff user wishes to order another copy or a different format of an existing resource.

• Option 2 is useful if the staff user wishes to create a new purchase request for a bibliographic record which is similar to an existing record.
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Purchase request "Use existing record" (March 2018)

• **Option 1** example
  • The institution has an E Book for "French women philosophers".
  • Now someone wants a physical version.
  • The record already exists in the repository

![Image of E Book record for "French women philosophers"

- Book Type: Book (Electronic)
- Author: Howells, Christina
- Language: English
- ISBN: 0415261392 (hb) and others
- Subject: Philosophy, French. Feminist theory
- Update Date: 06/03/2018
- Physical: 0
- Electronic: 1
- Digital: 0
- Other details: 

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Purchase request "Use existing record" (March 2018)

- **Option 1** example
- The staff user creates a new purchase request, select "use existing record" and clicks the pick list icon.
Purchase request "Use existing record" (March 2018)

- **Option 1** example
- Now search for the record and select it
Purchase request "Use existing record" (March 2018)

- Option 1 example
- The bibliographic information gets filled in for the purchase request

![Resource Information](image)
Topics

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Purchase request "Use existing record" (March 2018)

- **Option 2** example

- The institution already has title "**Twentieth-century** French women novelists" from the series "Twayne's world authors series. French literature"
- Now they want to order title "**Nineteenth-century** French women novelists" from the same series "Twayne's world authors series. French literature"
- Instead of entering the information from scratch they will search for it using "Use existing record", select it, then switch to radio button "Create new record" and change relevant fields
Purchase request "Use existing record" (March 2018)

- **Option 2** example
- The "similar" record already exists

![Example record]

- **Title:** Twentieth-century French women novelists / by Lucille Frackman Becker.
- **Language:** English
- **ISBN:** 0805782516 and others
- **Record number:** (OCoLC)18834502
- **Update Date:** 06/03/2018

**Details:**
- **Series:** Twayne's world authors series. French literature.
Purchase request "Use existing record" (March 2018)

- **Option 2** example
- The staff user creates a new purchase request, select "use existing record" and clicks the pick list icon.
• **Option 2** example

• He searches for and finds the "similar" record and selects it

Repository Search

![Screen capture of a search engine interface with the query "twentieth-century french women" highlighted.](image-url)
Purchase request "Use existing record" (March 2018)

• **Option 2 example**

Now in the purchase request he selects "Create new record". All fields become editable and he changes only what must be changed.
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Purchase request task list changes (May 2018)

• The task list now includes only "In Review" purchase requests.
• This creates a more efficient process for the end user.
• Previously it also included the "approved" and "rejected"
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Purchase request Primo form customization (May 2018)

- It is now possible to configure the Purchase Request form which appears to the end user in Primo.
- Here we will access it from the discovery configuration menu.
• On the next slide we see that by using the "Display to Public" column we can determine which fields the end user will have. We are defining that the end user will only have five fields:

1. Title
2. Author
3. Publisher
4. Year
5. Place

• Other fields such as ISBN, Volume, and lccNumber will not appear.
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<th>Field</th>
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<td>place_of_publication</td>
</tr>
<tr>
<td>No</td>
<td>volume</td>
</tr>
</tbody>
</table>
• On the next slide we see that when the end user fills out a Purchase request in Primo, he sees only the fields which have been defined to display to the public.
Purchase Request

Citation type  Book  Journal

Title

French librarians in the 17th century

Author

Publisher

Publication year

Place of Publication

RESET FORM  SEND REQUEST
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Purchase request deletion from Primo library card (May 2018)

- It is now possible for the end user to delete his purchase request via the Primo library card
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User level "Purchase request library" (June 2018)

- On the level of the user record there is a new field "Purchase request library"
• When a patron makes a purchase request or when a staff user makes a purchase request on behalf of the patron then:

1. If the patron has no "purchase request library" then any library can be the owning library of the purchase request.
2. If the patron does have one or more "purchase request libraries" then only those libraries can be the purchase request owning libraries.
User level "Purchase request library" (June 2018)

• For example:
  1. Patron Mary Jones has more "purchase request libraries" Design Library and Fine Arts Library

  ![Purchase request library]

  Design Library  Fine Arts Library

  2. Patron John Smith has no "purchase request libraries" then only those libraries can be the purchase request owning libraries.

  ![Purchase request library]
User level "Purchase request library" (June 2018)

- When purchase request is made for Mary Jones only the Design Library and Fine Arts Library can be the owning library of the purchase request.
User level "Purchase request library" (June 2018)

- When purchase request is made for John Smith then any library can be the owning library of the purchase request
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Relink Purchase Request to different record (July 2018)

- It is possible to relink a Purchase Request to a different bibliographic record.
- When doing "edit" on an existing purchase request there is an option to search for another title from the title pickup list.

1. After choosing the "new" bibliographic record the bibliographic information in the purchase request will get updated.
2. This is possible to do at all stages before the purchase request is approved (for example when it is in review).
Relink Purchase Request to different record (July 2018)

- Now we are going to choose a different bibliographic record
Relink Purchase Request to different record (July 2018)

- The same purchase request is now linked to the new bibliographic record

<table>
<thead>
<tr>
<th>General Information</th>
<th>Notes</th>
</tr>
</thead>
</table>

| Resource Information | | |
|----------------------|-----------------------------|
| Bibliographic information | | |
| Citation type | Book | Journal |
| Title | The history of RSS feeds and library innovation in north western Kentucky in the mid 1990's |
| Author | Kortick, Yoel |
| Edition | |
| ISBN | |
| LCCN | |
| Other system number | |
| Publisher | |
| Publication year | 2014 |
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Define new Purchase Request match method (July 2018)

• There is a new parameter to define what parameters will be used when matching a new purchase request. This is instead of the current hard coded match on ISSN or ISBN.

• The new parameter is in the configuration menu “acquisitions > other settings” and is called purchase_request_import_profile

• When a purchase request is made Alma looks at this import profile and use the match routine from there.

• It will also use the import profile definition to create the record in the network zone or institution zone (in the case of a consortium).
Define new Purchase Request match method (July 2018)

- Here we have an import profile called ‘ATO Purchase’ which matches in the 035, and it is defined in ‘other settings’
Define new Purchase Request match method (July 2018)

- In the repository we have MMSID 991351790000121 “The effort of French women” which has 035 $$a (OCoLC)01192668
Define new Purchase Request match method (July 2018)

- We also have MMSID 99142111200121 “Une femme française” which has 020 $$a 9781250097651 (hardback)
Define new Purchase Request match method (July 2018)

• If we create a record with both

  020 $$a 9781250097651 (hardback)
  035 $$a (OCoLC)01192668

  Then it should link to the record with the 035 and not to the record with the 020

• This is because we defined to use an import profile which matches on the 035.
Define new Purchase Request match method (July 2018)

• Here is a new purchase request with an ISBN and a 035, both of which exist in different records in the repository
Define new Purchase Request match method (July 2018)

• The purchase request gets created and we see that it matches MMSID 991351790000121 “The effort of French women” which has 035 $$a (OCoLC)01192668
Define new Purchase Request match method (July 2018)

- It is correct that it linked to MMSID 991351790000121 “The effort of French women” which has 035 $$a (OCoLC)01192668

- It should not have linked to MMSID 991421112000121 “Une femme française” which has 020 $$a 9781250097651 (hardback)

- This is because the import profile matches on 035 and not 020
Thank You
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