



Leganto Tighter
Integration for
Purchase Requests
Focus Group
Developed
Enhancements



Managing PO Lines: Add Edit in View Mode

- Adding an option to "Edit" the PO line when it's in view mode
- Prevents the need to back out and search for PO Line to Edit after approving the purchase request

Purchase Request Form: Course Info Table

Managing Purchase Requests Created From Citations

March 2020 Fulfillment - Course Reserves

The **Course Information** table has been added to the **Purchase Request** form, displaying basic information about the course.

Course Information							
Code	Section	Name	Processing Department	Academic Department	Number Of Participants	Instructor	Term
1. ORG651	-	Leadership in public organizations	Business Administration		105	Multiple	-
Number of total copies		5					
Citation Tag		Essential					
Created automatically by rule		Citations with Essential Tag - Auto Purchase Req					

Course Information Table

Manage Purchase Requests: Facets

The following facets have been added to the Manage Purchase Requests screen (Acquisitions > Manage Purchase Requests):

- Processing department
- Academic department
- Campus
- Course year
- Course term
- Citation tag

The screenshot displays the Manage Purchase Requests interface. On the left, a sidebar contains several facets with their respective counts:

- Citation type**: Book (12), Journal (9)
- Request format**: Default (1), Physical (20)
- Vendor**: A&E HOME VIDEO (1), HARRASSOWITZ (1), Automation Vendor (2)
- Owning library**: O'Neill (14), Bapst (1)
- Requester**: Implementer, Ex... (11), Manager, Acquisiti... (9), 1427869790_upd... (1)
- Created from reading list**: No (17), Yes (4)
- Processing department**: Test Unit (1)
- Academic department**: Romance Lang... (1)
- Course year**: 2010 (1)
- Course term**: Winter (1)

The main area shows a list of 8 purchase requests, each with a checkbox, title, citation type, request status, PO Line Reference, and requester. The requests are:

- L2/ Aphrodite: Greek Goddess of Love and Beauty Tammy gagne
Citation type: Book
Request status: In Review
PO Line Reference: -
Requester: Implementer, Ex Libris
- stam title**
Citation type: Book
Request status: In Review
PO Line Reference: -
Requester: Implementer, Ex Libris
- stam title**
Citation type: Book
Request status: Approved
PO Line Reference: 15-311945
Requester: Implementer, Ex Libris
- New Zealand /**
Citation type: Book
Request status: Approved
PO Line Reference: 15-311906
Requester: Implementer, Ex Libris
- Journal of advertising research.**
Citation type: Journal
Request status: Approved
PO Line Reference: 15-311946
Requester: Implementer, Ex Libris
- The sixties and beyond :**
Citation type: Book
Request status: Rejected

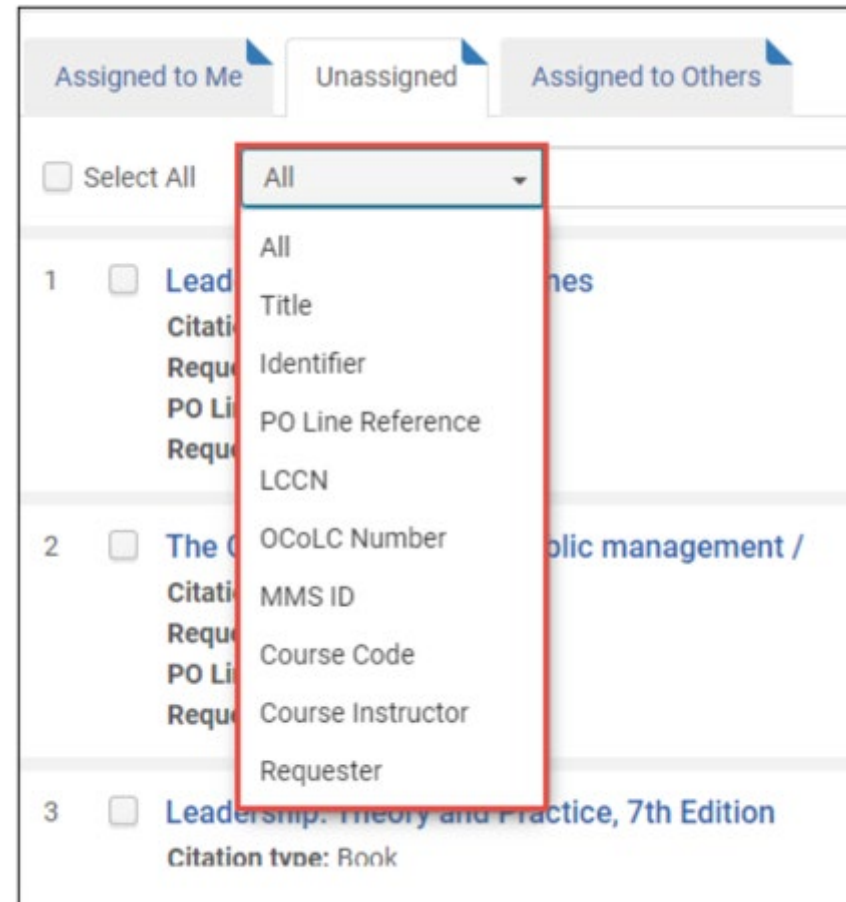
At the bottom right, there is a pagination control showing "1 of 2" and navigation arrows.

Facets Added to the Manage Purchase Requests Screen

Manage Purchase Requests: Search Criteria

The following search criteria have been added:

- Course Code
- Course Instructor
- Requester



Added Search Criteria



Associate Citation with MMS_ID

- Once BIB is created – associate to citation
- This will ensure availability is displayed on citation once purchasing is complete



Tighter Purchase Integration Focus Group Membership

- Members:
 - **Curtin University:** Linda Sheedy, Gail Valencia
 - **The University of Adelaide:** Julie Wright
 - **The University of Edinburgh:** Alistair Millar, Angela Laurins
 - **The University of Manchester:** Linda Pover
 - **The University of New South Wales:** Alison Neil
 - **The University of Sheffield:** Chris Jones, Emily Bogie, Fran Abbs, Rosa Sadler
 - **The University of St. Thomas:** Tina Witzel, Deb Juarez



Focus Group Process

- Determine membership
- Discussed customer needs during in-person meetings and on Basecamp
- Needs are outlined and solutions are offered by Ex Libris
- Customers give feedback to the solutions provided
- Ex Libris creates development plan for some needs, while others are assigned to undergo a community validation process
- Community validation will be coordinated using Idea Exchange and Leganto-L in the near future